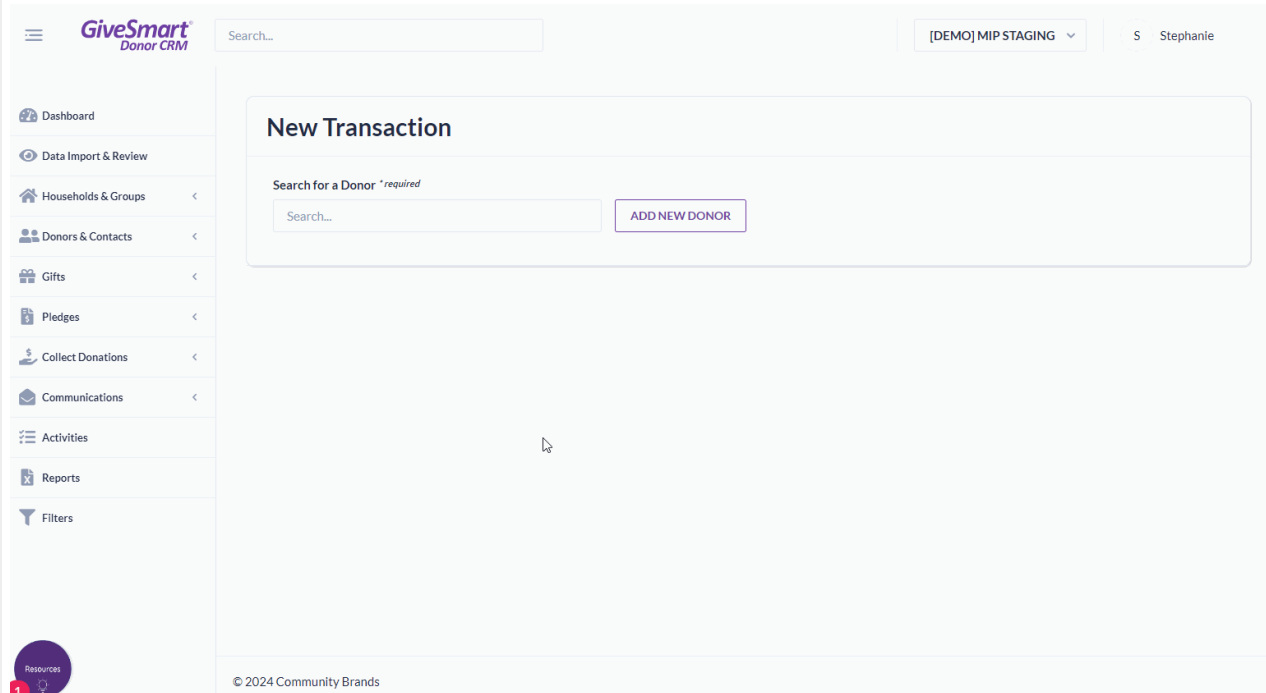


Add a New Gift

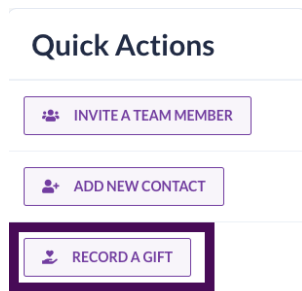
Last Modified on 06/27/2024 1:04 pm EDT

Watch this video to learn how to add/document a new gift in your GiveSmart Donor CRM account.

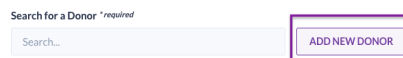


Steps to add a gift record

1. From the Quick Actions container within the dashboard, click **RECORD A GIFT**



2. Select a donor
 - o Add to existing donor
 - Search for donor and select
 - o Add to new donor
 - Select **ADD NEW DONOR**



- Enter donor details
 - If a new contact is an Organization, toggle to 'Organization' in the upper right corner

The screenshot shows the 'New Contact' form with the following fields and options:

- Contact profile:**
 - First Name (text input)
 - Last Name (text input)
 - Title (text input)
 - Salutation (text input)
 - Suffix (text input)
 - Tags (dropdown menu)
 - Notes (text area)
 - Birthdate (calendar icon) and Do Not Contact
- Contact Methods:**
 - Cell Phone (dropdown menu)
 - Email (dropdown menu)
- Organization:** Organization (checkbox, highlighted with a red box)

3. Select solicitation method
4. Enter gift details
 - Choose if the gift will be a Tribute or needs a Soft Credit (Optional)

The screenshot shows the gift details form with the following fields and options:

- Gift Date:** Jun 10, 2024
- Gift Amount:** \$50.00
- Payment Type:** Check
- Fair Market Value:** \$0.00
- Check Number:** Check Number
- Tax Deductible Amount:** \$0.00
- Additional Payment Details:** Payment Details
- Make this Gift a Tribute:** Make this Gift a Tribute
 - Gift in Honor
 - Gift in Memory
- Tribute To:** Enter Tribute Name
- Soft Credit:** Soft Credit

- Make this gift a **Tribute**
 - select the box next to Make this Gift a Tribute
 - choose between Gift in Honor or Gift in Memory
 - enter the name of the tribute
- Add a **Soft Credit** to this Gift
 - select the box next to Soft Credit
 - enter the name of an existing contact, and select from the dropdown or select Credit Additional People to add a new contact
 - click the dropdown arrow next to Amount to choose between a dollar amount or percent
 - enter the amount of soft credit this contact will receive

- **NOTE:** A soft credit report can be viewed by selecting **Gifts** from the left navigation and choosing **Soft Credits**.

5. Select thank you method
 - Email only
 - Letter & email
 - Letter only
 - No thank you letter
6. Add optional details
7. Enter custom field info (if available)
8. Select Summary to review the details then click **Submit**